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TO: Florida Department of Transportation

FROM: The Schapiro Group, Inc.

DATE: August 19, 2014

RE: Customer Satisfaction Tracking Study — District 4 Results

The Schapiro Group (TSG) interviewed 300 Florida freeway drivers across District 4 as part of a larger statewide survey effort to explore ongoing usage of, attitudes toward, and perceptions of the Florida Department of Transportation's (FDOT) Intelligent Transportation Systems (ITS) services. Data collected in 2006, 2008, 2010, and 2012, in addition to the 2014 results, allow for changes in usage and attitudes to be tracked over time. During the months of April-June 2014, TSG randomly sampled phone numbers within Broward, Indian River, Martin, Palm Beach, and St. Lucie Counties to obtain scientific telephone survey data. The margin of sampling error for results is  $\pm 5.7\%$ . This report summarizes key changes in attitudes and behaviors regarding ITS services over the past eight years.

Some research highlights from District 4 include:

### Driving Patterns and Traffic Information Services

- The number of drivers on District 4 freeways has remained steady since 2010 during the morning and evening rush hours. Since 2012, the number has remained steady during the day, but decreased slightly during the evening hours.
- The number of drivers using radio traffic reports dropped from 53% in 2012 to 46% in 2014. The same pattern was evident in usage of television traffic reports (52% in 2012; 41% in 2014). Of the drivers who use these sources, a strong majority continues to see them as at least "somewhat useful" in aiding their trips.
- Drivers use several different sources for their traffic information, but their usage patterns have changed since 2012. Electronic message signs continue to lead the list, but usage dropped from 77% in 2012 to 52% in 2014. Use of in-car navigation systems rose from 33% in 2012 to 43% in 2014, while use of mobile apps (29%) almost doubled over the past two years. Roughly one-quarter of drivers continue to use websites on their computer or cell phone (this description changed from "home or work computers"). All other tested sources are used by less than 20% of drivers.
- Among drivers who use websites for traffic information, Google continues to be used by 17% of drivers. Use of local TV and radio station websites dropped from 28% in 2012 to 15% this year. Over half of drivers (57%) indicate some other site or they do not know.
- Starting in 2014, we asked drivers who use mobile apps for traffic information about their main mobile app for this kind of information. Google maps (29%) is the leader by far, followed by Waze (16%). Just about half (48%) either do not know or indicate some other site.

## ITS Services: 511 Traveler Information System

- When asked if they would use a service that provided traffic information through a phone call, website, mobile app, or social media site, a majority (53%) of drivers continues to say that they would be likely to use it.
- Similar to 2012, 28% of drivers are aware of the 511 Traveler Information System. In that same time period, the percentage of those who use the service has increased to 28% from 19% two years ago. District 4 drivers are most likely to find out about 511 through a friend or acquaintance.
- Starting in 2012, respondents who use the 511 Traveler Information System are now asked which services they use. The most popular remains the call-in service at 44%, though that is down from 54% in 2012. Use of the website has jumped from 11% in 2012 to 31%, while use of the mobile app dropped slightly to 25%. No other service is used by more than 15% of 511 Traveler Information System users.
- As was true in 2012, drivers are most likely to use the 511 Traveler Information System while stopped in traffic or approaching congestion (42%) and while on their way to their destination (38%). Usage before they leave for their destination increased to 37%, up from 21% in 2012.
- Roughly two-thirds (64%) of drivers changed their route based on the information they received from the 511 Traveler information System (up from 55% in 2012). Some have changed their estimated time of arrival (38%), stress level (21%), or their departure time (18%).

## ITS Services: Electronic Message Signs

- A solid majority (77%) of District 4 drivers continues to read electronic message signs at least once per week, though this number dropped from 88% in 2012. Most users continue to believe the signs are accurate (95%), useful (91%), and easy to read (85%), and 80% continue to be likely to change their route based on information they see posted.

## ITS Services: Road Rangers

- Awareness of Road Rangers has not changed much since 2010, with just under two-thirds (63%) of drivers aware of the service. Not all drivers who have heard of Road Rangers know how to request their assistance, though; 18% have top-of-mind awareness of how to contact one. When prompted with a reminder about \*FHP/\*347, however, 63% of other drivers say they know to call that number to request assistance. Even among drivers who say they do not know how to contact a Road Ranger, 57% have heard of \*FHP/\*347. All of the Road Ranger findings are virtually unchanged since 2012.
- The number of District 4 drivers who have been assisted by a Road Ranger went from 20% in 2012 to 29% in 2014. Virtually all (91%) of those who had been assisted continue to say that the Road Ranger was “very helpful.” As has been true in the past, most drivers (88%) who know about Road Rangers, even those who have not had direct experience with

them, believe this service to be at least “somewhat useful.”

- When asked what types of additional information they would like FDOT to provide to Florida drivers, 66% say they would like information about alternate routes to help them avoid traffic incidents. This is, by far, the leading option, and continues the pattern seen in previous years.